7 STEPS TO B2B ECOMMERCE

Whether you are considering making the leap to B2B for the first time, or are looking to rearchitect or upgrade your existing solution, there are 7 key steps to make sure you are ready to take the plunge.

Hedgehog

The B2B Ecommerce market is predicted to grow to $1.13 trillion by 2020 in the US alone[1]. For those with the desire and ability to sell through the B2B market, the potential is too great to ignore. Whether you are considering making the leap to B2B for the first time, or are looking to rearchitect or upgrade your existing solution, there are 7 key steps to make sure you are ready to take the plunge.

But first you must adopt the right mindset. This is nothing like B2C. It may look similar, and the customer experience will have a lot of similar elements, but the process is virtually always unique to each seller. Your company will not be any different. Whether it's your marketing support terms or shipping logistics, there will always be a unique set of business practices that need to be expressed effortlessly online.

The fact that you can't rely on out-of-the-box solutions means you've entered the world of enterprise solutions (even if your technology budget is small). In this world, you'll need to do a bit more work getting prepared for the project. So whether you're planning an RFP or have a partner and platform already in mind, a little preparation, in the form of our 7 steps, will help you immensely by the time you are done.

The first 4 steps are part of Investigation – discovering how your business really runs. The intersection of people, process and technology exposed to daily operations is the core of your company, and you need to get it on paper (or a hard drive).

[1] Forrester Research B2B eCommerce Forecast, 2015 To 2020 (US)

1. Document Your Selling Practices

The very first step is to capture how you sell stuff. No matter how much you think you know, you don't know it all of it. Most companies fail to capture all of the variables involved in sales, leading to scope creep within an implementation. This can cause steep increases in the total outlays, since making changes once implementation has started can cause havoc.

The flip side of the internal selling practice is the customer experience. Documenting this is just as important. Combining an outside-in view with the inside-out will give a far more complete understanding of how you do business. It may be a daunting task, but it will be essential when working on your initial solution designs.

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There are a number of methods to do this knowledge capture, including interviews, code inspections, journeys mapping, workshops, and site crawls. Chooseing a combination with the highest likelihood of capturing all of the important elements while staying within a reasonable budget and timeframe is your key task.

2. Evaluate Your Technology

The move to B2B will touch every bit of technology you own. Every crufty old system, every jury-rigged process, every spreadmart will have an impact. B2B is particularly reliant on performant integration, so doing a thorough investigation of your systems, your architecture and any custom solutions hiding out there will be vital when you start putting the pieces together for your B2B solution.

Like selling practices, there are a number of ways to go through this discovery. If you are lucky, your IT department has been really good for the last several years and has everything documented. Right. More likely, the major systems are well understood, but there are a number of secondary systems tucked in corners that only a few people know about. Your job now is just to find them. You'll worry about their impact on the project later, but for now you just want as complete a picture as you can get. Interviews, server scans, code reviews, workshops and data flow driven investigation should uncover everything that is out there.

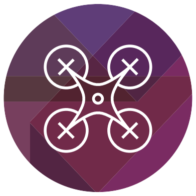
3. Understand Content and Product Development

Chances are you spend a lot more time and effort generating content than you realize. And how that content flows into your systems is going to have a much larger impact on B2B, since your buyers will be far less willing to accept subpar content when making purchase decisions.

Understanding these use cases and mapping how the processes work will be valuable for the eventual B2B solution, but its likely you will find immediate opportunities to improve. Few companies we work with have this completely ironed out, especially if there is a large amount of content you need to upgrade as part of a B2B launch.

Unless you have a true content production system, combining the workflows around photography, copy, CMS import, page setup and page optimization will have a big impact on the eventual solution.

4. Understand Your Leverage Points



Here’s where you start going beyond simple investigation. Looking at what you’ve learned in steps 1-3, its time to figure out what makes you successful. Is it your pricing policy? Is it exclusive product? Is it fast order processing? Your task here is to tease out where you have real leverage in your business. Because the rest isn’t helping you. This will help you establish budgets for enhancements and improvements as you make the move.

Often a consultant is a big help here. Someone asking the right questions, examining the right analytics and metrics, and talking candidly with your customers can figure out your secret sauce. This is like developing a vision statement, in that everyone will have an opinion. Your role will be to pare it down to the most important elements, since these are the ones that have to be rock solid in the new solution. The less important elements have to function, but potentially not at the same level of sophistication.

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For example, you may decide product configuration and installation scheduling are the biggest levers in your business. Or it could be in situ 3D visualization. Whichever is important, that’s where your effort should go, and the decision to choose an implementation partner would be weighted heavily towards those with that experience. One mistake many companies make is to say that everything is important. This puts you into a position of failure, since you are not allocating the most time and effort to the capabilities most important for your success.

The last 3 steps in the process fall into the category of Definition – what you want your solution to do. Even though your final solution will be defined with your chosen partner, you want a good idea of how your end state will look, so that you can have productive conversations and an idea of your priorities before you start spending money.

5. Define the Role of Sales Reps and Support

How your team is involved in the selling process will have a big role in the end solution. Do they need to generate quotes by hand? Do they need to negotiate prices? Do they need to meet face to face with key buyers and negotiate product placement, returns, floor space, minimums, etc. using reports from the system? Part of your role here is to determine how much of what they do can be converted to an automated system. Quotes can be automated. Payment reminders can be automated. Lead followup can be automated. Really understanding where the people add value and defining their role in the process will ensure your solution creates maximum benefit to the company.

6. Define Your Integration Points

Through your discovery process, you'll have found a number of systems providing data to the overall solution. Defining these explicitly, and understanding their limitations, is crucial to the resulting architectural approach. Knowing your costs come from an ERP system that updates daily might allow you to cache that data instead of hitting the ERP each time and loading it with requests. Knowing customer profile data can be updated across multiple touchpoints in real time will force you to account for a real-time system in your solution.

This sounds like the least fun part of preparation, but it where most projects succeed or fail. Missing a data source will lead to mid-stream changes that can be catastrophic. For example, if it turns out the pricing agreements for major customers are on spreadsheets on the VP Sales's laptop, you'll have to find a way to get that data into a managed system and accessible by the B2B ecom solution. Or if availability to ship is in your warehouse management system (which has never been exposed to the outside before), you'll have work to do both exposing its data and ensuring it stays secure and performant.

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7. Define Your Business Processes and Data Flows

Finally it will start to feel like you are making progress. As you detail how your business processes should work and how data will flow through the system, a complete picture of where you will be at project's end will be within reach. Don't worry about the how, worry about the what. The how is your partner's problem.

Use cases are an effective mechanism for ensuring you've covered all topics. Walk through the core ones (initial purchase, reorder, change shipping terms, orders meeting promotion rules, etc.) with your team to make sure you have the important processes covered. the corner cases are important too, but you want your budget and attention on the 20% of cases that drive 95% of revenue and profit.

Its here that you have an opportunity to rethink what your company does. Manual quotes? If most quotes can be accomplished by an online browser adding items to a cart and clicking "get quote", applying pricing rules and emailing a pdf, why not just automate the 95% that meet the core criteria? How many hours of labor a year will you save? Its much, much easier to design on paper than to course-correct in the middle of implementation. Take the time now to get your designs solid and logical, and you'll the benefits in a smoother, drama-free project.

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Here, again, a consultant will probably be your best option. Someone who has done this 100 times can rip through the process modeling and ask the right questions about data flows.

Contact Us

Are you considering selling your products or services through B2B channels? Hedgehog can help plan, develop and deploy your B2B ecommerce solution.

sales@hhogdev.com
631.676.2186

Conclusion

As a practitioner considering an upgrade to your B2B capabilities, spending a little time up front figuring out what to do will pay back many times over. Remember that you will only do this a couple of times in your career, so leveraging people who do this for a living will be of great benefit. The 7 steps here will help you understand what the pre-planning process should look like, and help you make sure your implementation partner has a very clear understanding of the end state.